

Lump Sum ISA (Stocks & Shares) Application and Transfer Form



By completing this form you are making an application to open a Lump Sum ISA, which allows you to make tax-free lump sum contributions into a Stocks and Shares ISA in order to build up a fund accessible over the medium to long term.

If you already have an existing Lump Sum ISA with us and wish to transfer funds from another ISA elsewhere into it, please complete the transfer form section or visit mpfs.org.uk/transfer

The Lump Sum ISA may be appropriate for investors who:

- ☒ Are aged 18 or over
- ☒ Want a medium to long-term investment (at least 5 years)
- ☒ Are willing to accept medium risk for potential higher returns (bonuses)
- ☒ Want the potential for both annual bonuses and a final bonus (after 5 years)
- ☒ May wish to make partial withdrawals in the future
- ☒ Have funds set aside for an emergency.

Mr/Mrs/Ms/Miss/Other	Surname	Forename(s)
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First line of home address	Postcode
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Date of Birth	National Insurance Number
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National Insurance Number If you have your National Insurance (NI) number please enter it in the boxes above
You can find your NI number online in your HMRC account or App, in any documents you already have, for example a payslip, P45 or P60, or at gov.uk/find-national-insurance-number You must provide a National Insurance number to apply for an ISA unless you are not eligible for one.
You can check if you're eligible and apply online at gov.uk/apply-national-insurance-number

Are you eligible for an NI number? Put an 'X' in one box

Yes ☐ If Yes, you must apply for an NI number and provide it before you complete your ISA application. See link above. No ☐

Personal Email	Mobile No
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We would like to contact you from time to time with relevant information on financial issues relating to the Police, such as Police pay, and products and services we provide including special offers. You will be able to unsubscribe from these communications easily and at any time.

Please provide me with the above information by

☐ SMS ☐ Email ☐ Post ☐ Phone ☐ None

Do you have knowledge or experience of With-Profits or pooled investments such as Stocks & Shares ISAs or With Profit Bonds?

☐ Yes and I have read and understood the **Lump Sum ISA Product Guide** and **Key Information Document***

☐ No

*A copy of these will be available during meetings with our representatives or on the product page of the website when selecting this product online. In addition, a copy will also be posted to you once your Lump Sum ISA is set up. If you do not understand any of the points, please ask for further information.

I apply to open and subscribe to the Lump Sum ISA for the tax year 2025/2026 (06/04/25 to 05/04/26) and any amounts I may decide to invest in subsequent years.

☐ I understand that my personal ISA allowance may change. Current UK ISA allowances can be found at: gov.uk/individual-savings-accounts

Make a Lump Sum Investment of £ (£2,000 min)

☐ I have made/will make a payment via Bank Transfer (please quote the Warrant/Pay number as the REFERENCE) to
MPFS Bus Acc Sort Code: 56-00-33 Account Number: 49993186

☐ I enclose a cheque made payable to MPFS Ltd

☐ Transfer funds from an existing ISA. The paperwork to transfer from an existing ISA held with another ISA provider is attached.

Source of Funds

- ☐ Inheritance ☐ Pension commutation ☐ Investment maturity ☐ House sale ☐ ISA transfer ☐ Savings
- ☐ Other (please state)

If Applicable

Police Join Date

Constabulary (or connected constabulary of family member/friend etc.)

Warrant Number/Customer/Membership No.

What best describes you - e.g. serving Officer/Staff/retired/relative/former/current family member/friend, etc.

Confirming Your Identity

To process your application, we will refer to Credit Reference Agencies to confirm your identity. This search will leave a 'footprint' on your credit file, which is required to record that the check has taken place. This footprint is not the same as a credit check footprint and has no negative impact on your file. Please read the following:

ID Declaration

I understand that you will undertake a search with a Credit Reference Agency for the purposes of verifying my identity. To do so the Credit Reference Agency may check the details I supply against any particulars on any database (public or otherwise) to which they have access. They may also use my details in the future to assist other companies for verification purposes. A record of the search will be retained. Your information may be disclosed to a credit reference agency, which may keep a record of that information; and the credit reference agency may disclose that information, and the fact that a search was made, to its other customers for the purposes of assessing the risk of giving credit and occasionally to prevent fraud, money laundering and to trace debtors.

ISA Declaration & Authorisation

I declare that:

- All subscriptions made, and to be made, belong to me.
- I am 18 years of age or over.
- I have not subscribed, and will not subscribe, more than the overall subscription limit in total to any combination of permitted ISA types in the same tax year.
- I am resident in the United Kingdom for tax purposes:
 - or, if not resident, perform duties which, by virtue of Section 28 of the Income Tax (Earnings & Pensions) Act 2003 (Crown employees serving overseas), are treated as being performed in the UK
 - or I am married to, or in a civil partnership with, a person who performs such duties
- I will inform MPFS if I cease to be resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties.
- I agree to the ISA terms and conditions.

I authorise MPFS

- to hold my cash subscription, any other proceeds in respect of my ISA investments and any other cash.
- to make on my behalf any claims to relief from tax in respect of ISA investments.
- to deduct from my salary/bank account all such premiums that may become due.

Declaration

- I declare that the information given is correct to the best of my knowledge and belief and apply for the Lump Sum ISA and accept the terms and conditions as described within the product literature and elsewhere within this application. I confirm I have also read the Key Information Document.
- I apply for membership in accordance with the provisions of its Rules (unless I am already a Member) and I agree to abide by the Rules at all times. (A copy of our Rules appears on mpfs.org.uk and are available in printed form upon request).

Signed **APPLICANT**

Date

Promotional Code **IF APPLICABLE**

OUR DATA PRIVACY STATEMENT We need the information you provide in order to set up the contract between you and us. We will share your data with our mailing house partners (see our privacy notice) to send you legally required documents such as your annual benefit statement and invitation to our Annual General Meeting. Your data will only be kept for such a time needed to perform this task. Where possible, we use external information to verify your identity and to keep our records up to date on home address changes. We use a third-party provider to deliver our marketing emails. We gather statistics around email open rates and clicks using industry-standard technologies. For more information, please see our privacy notice at mpfs.org.uk/privacy

Need another copy of this form? Perhaps for a family member or Police colleague?
Download at mpfs.org.uk/lumpsum or call **01689 891454**

Contact Details

MPFS, Central Court, Knoll Rise, Orpington, BR6 0JA
Phone: 01689 891454 Email: info@mpfs.org.uk

Police Friendly & Metfriendly are the trading names of the Metropolitan Police Friendly Society Limited.

Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.
Incorporated under the Friendly Societies Act 1992 and registered in the UK No. 496F

Lump Sum ISA (Stocks & Shares) Transfer Application Form

By completing this form you are requesting to transfer your ISA, currently held with another provider, to us. The minimum transfer into a Lump Sum ISA is £2,000 with no upper limit.

Please do not hesitate to contact our Member Services team on **01689 891454** should you have any queries or require further support.

Mr/Mrs/Ms/Miss/Other	Surname	Forename(s)
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First line of home address	Postcode
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Date of Birth	National Insurance Number
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National Insurance Number If you have your National Insurance (NI) number please enter it in the boxes above

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Are you eligible for an NI number? Put an 'X' in one box

Yes ☐ If Yes, you must apply for an NI number and provide it before you complete your ISA application. See link above. No ☐

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Constabulary (if applicable)

For your own benefit and protection, you should read the **Key Information Document** and **Product Guide** relating to this plan. A copy of these will be available during meetings with our representatives or on the product page of the website when selecting this product online. In addition, a copy will also be posted to you once your Lump Sum ISA is set up. If you do not understand any of the points, please ask for further information.

I apply to transfer my existing ISA a/c no

In whole ☐ In part ☐ (please specify amount £'s)

Estimated value of ISA transfer **£**

(Your existing provider may have rules around the current tax year contributions, so you may wish to check with them first.)

From (existing manager)

Name:

Address:

To

MPFS Bus Acc
Central Court, Knoll Rise,
Orpington, BR6 0JA
Tel: 01689 891454

Where a period of notice is required for closure/part transfer of the existing ISA I give my consent to either: (please tick as appropriate)

1. Serve the full notice period before this instruction can be processed; or ☐

2. Proceed immediately with the transfer and bear the consequential penalty that may be applied. ☐

If you want to pay other monthly or lump sum contributions, you will need to send us the appropriate application.

ISA Declaration & Authorisation

I authorise MPFS

- to contact my existing ISA manager to arrange this transfer.

I authorise my existing ISA Manager (as specified above)

- to transfer the ISA (account number above) to MPFS
- to provide MPFS with any information, written or non-written, concerning the existing ISA
- to accept any instructions from MPFS relating to the ISA being transferred.

Declaration

- I agree to the ISA terms and conditions. I declare that the information given is correct to the best of my knowledge and belief.

Signed **APPLICANT**

Date

Promotional Code **IF APPLICABLE**

OUR DATA PRIVACY STATEMENT We need the information you provide in order to set up the contract between you and us. We will share your data with our mailing house partners (see our privacy notice) to send you legally required documents such as your annual benefit statement and invitation to our Annual General Meeting. Your data will only be kept for such a time needed to perform these tasks. Where possible, we use external information to verify your identity and keep our records up to date on home address changes. We use a third-party provider to deliver our marketing emails. We gather statistics around email open rates and clicks using industry-standard technologies. For more information, please see our privacy notice at mpfs.org.uk/privacy

Contact Details

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